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Automated assurance systems: worldwide market shares 2018

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RESEARCH

About this report

This report provides market share data for communications service provider (CSP) spending on telecoms-specific automated assurance software systems and related services for 2018. It provides details of how the spending varied by delivery model, service type, vendor and region. The report also includes 'snapshots' of information about the leading vendors in the market.

It is based on several sources, including:

- interviews with CSPs and vendors worldwide
- Analysys Mason's research conducted during the past year.

GEOGRAPHICAL COVERAGE

- Worldwide
- Central and Eastern Europe
- Developed Asia–Pacific
- Emerging Asia–Pacific
- Latin America
- Middle East and North Africa
- North America
- Sub-Saharan Africa
- Western Europe

SUB-SEGMENT COVERAGE

- Probe systems
- Service management (SM)
- Fault and event management (FM)
- Performance monitoring (PM)
- Workforce automation

KEY QUESTIONS ANSWERED IN THIS REPORT

- What was the overall size of the market for automated assurance software systems for the telecoms industry and what drove this spending among CSPs?
- How did the spending vary across different sub-segments of the automated assurance market?
- Who are the major vendors and what is their share of revenue in the automated assurance systems market?
- What are the different drivers and growth rates of CSP spending on products, product-related services and professional services?

WHO SHOULD READ THIS REPORT

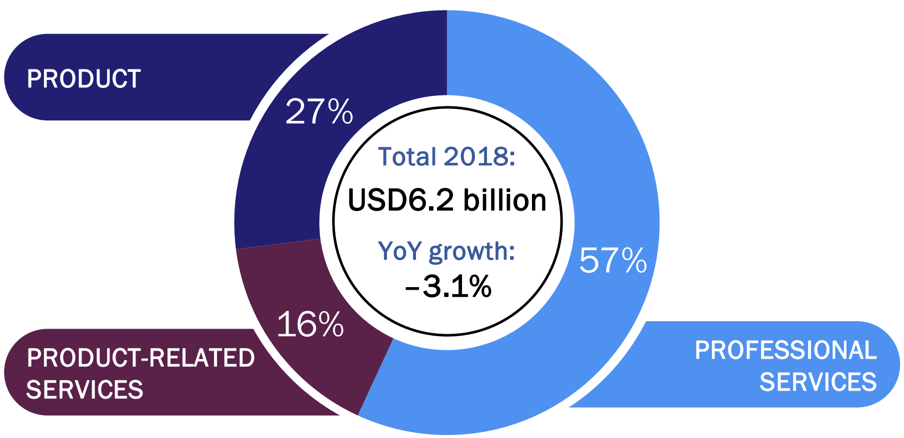
- Vendor strategy teams that need to understand where growth is slowing and where it is increasing across different sub-segment categories.
- Product management teams responsible for feature functionality and geographical focus, and product marketing teams responsible for market-share growth.
- Market intelligence teams at vendors that want to understand how their competitors compare with each other.
- CSPs that are planning digital transformation journeys and want to ensure that their current vendors are staying up to date.

Dashboard: automated assurance systems revenue market shares

KEY MARKET DEVELOPMENTS IN 2018

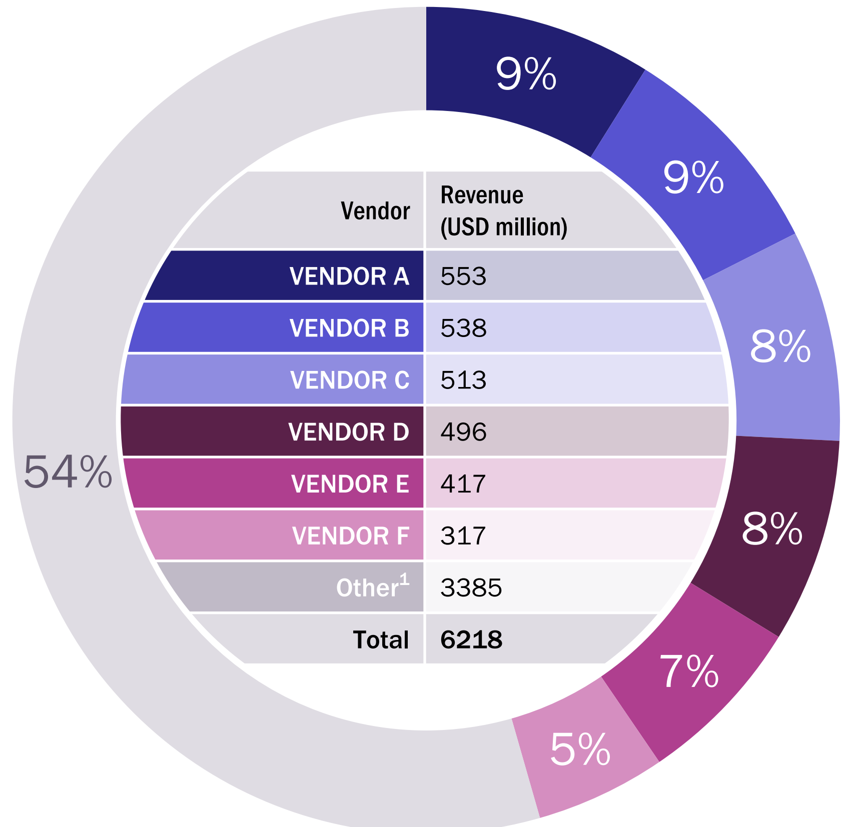
- The overall market declined by 3.1% owing to a continued period of market realignment for the new operations model to support NFV/SDN and 5G. The large NEPs and ISVs dominate the top-six vendors.
- Technology refresh for virtualised networks and operations automation were the key drivers for investment across the assurance segments.
- The demand for professional services was higher than 2017 because CSPs engaged with vendors and partners on custom consulting and systems integration projects to offset for the maturing products in areas such as machine learning (ML) and predictive operations.

Figure 1: Automated assurance systems total revenue by type, worldwide, 2018



Source: Analysys Mason

Figure 2: Automated assurance systems total revenue by vendor, worldwide, 2018



Vendor	Revenue (USD million)
VENDOR A	553
VENDOR B	538
VENDOR C	513
VENDOR D	496
VENDOR E	417
VENDOR F	317
Other[1]	3385
Total	**6218**

Source: Analysys Mason

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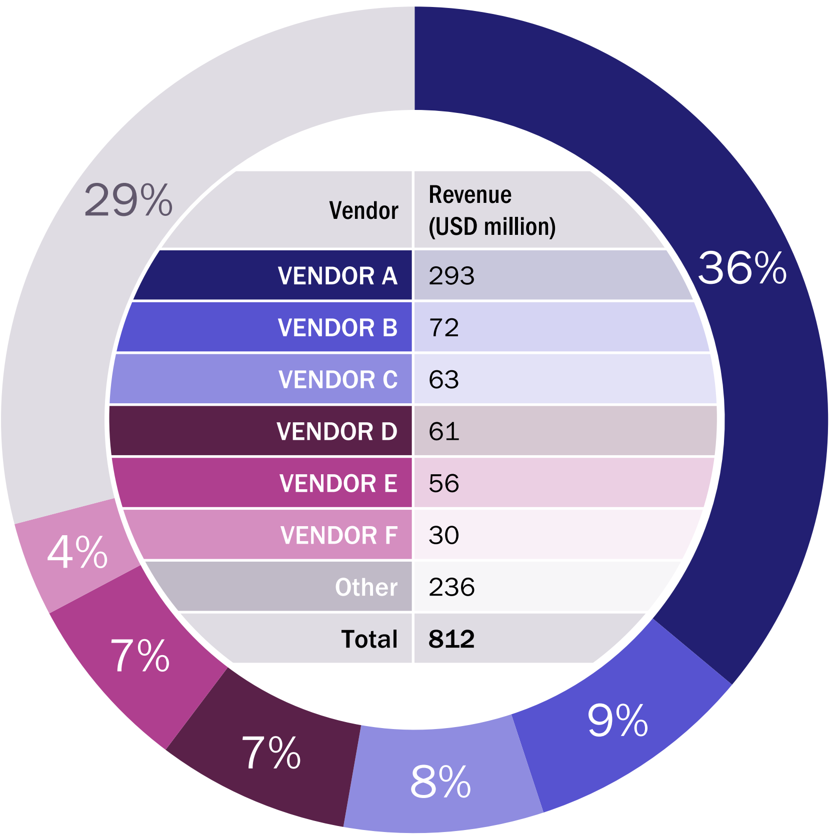
Probe systems product-related revenue market share

Figure 13: Probe systems product-related revenue by vendor, worldwide, 2018



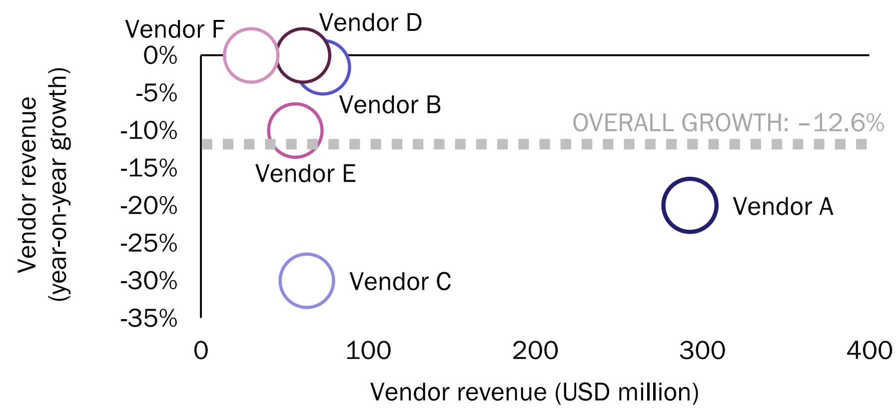
Vendor	Revenue (USD million)
VENDOR A	293
VENDOR B	72
VENDOR C	63
VENDOR D	61
VENDOR E	56
VENDOR F	30
Other	236
Total	**812**

Source: Analysys Mason

KEY MARKET DEVELOPMENTS IN 2018

- The market declined by about 14% in 2018 as the transition continued towards software-based probes and software licensing models. Accedian entered the top six.
- Some CSPs deployed probes from NEPs for VoLTE assurance to achieve faster time to market and bridge feature gaps.
- CSPs demanded varied form factors for probes (physical, virtual and cloud native), as well as wanting lower price points.
- Most vendors had success selling analytics-based use cases such as service quality assurance and CEM.

Figure 14: Revenue and growth of top-six vendors compared to overall revenue growth in the probe systems market, 2018



Source: Analysys Mason

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About the author and Analysys Mason

About the author

Anil Rao (Principal Analyst) is the lead analyst for the Automated Assurance and Service Design and Orchestration research programmes, covering a broad range of topics on the existing and new-age operational systems that will power operators' digital transformations. His main areas of focus include service creation, provisioning and service operations in NFV/SDN-based networks, 5G, IoT and edge clouds; the use of analytics, ML and AI to increase operations efficiency and agility; and the broader imperatives around operations automation and zero touch networks. In addition to producing both quantitative and qualitative research for both programmes, Anil also works with clients on a range of consulting engagements such as strategy assessment and advisory, market sizing, competitive analysis and market positioning, and marketing support through thought leadership collateral.

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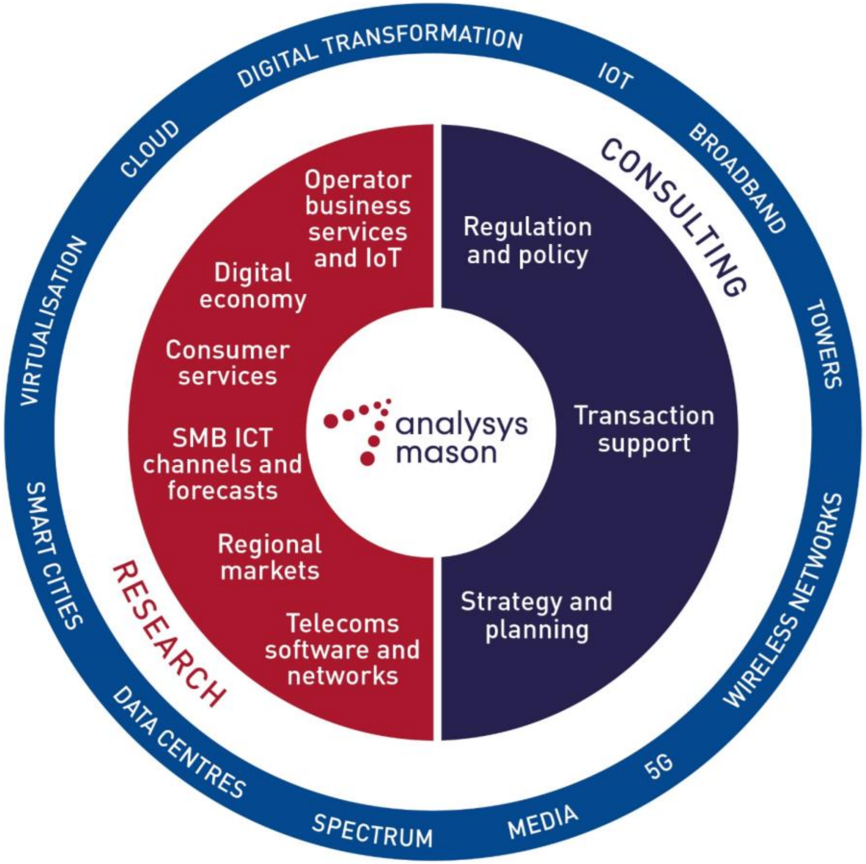
Analysys Mason's consulting services and research portfolio



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Digital Economy Strategies
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